

Report Date: 08 Feb 2016

**Summary Report for Individual Task
805C-42A-4021
Review the Evaluation Reporting System
Status: Approved**

Distribution Restriction: Approved for public release; distribution is unlimited.

Destruction Notice: None

Foreign Disclosure: FD1 - This training product has been reviewed by the training developers in coordination with the USASSI / Fort Jackson SC foreign disclosure officer. This training product can be used to instruct international military students from all approved countries without restrictions.

Condition: You are the Senior HR NCO and must oversee the Evaluation Reporting System (ERS) for your unit. You have access to AR 623-3 (Evaluation Reporting System), DA PAM 623-3 (Evaluation Reporting System), applicable NCO and officer evaluation forms, and HR enabling systems. This task should not be trained in MOPP 4.

Standard: With a minimum of 70% accuracy, advise personnel on the principles of the ERS, verify rating chain officials and the rating scheme, advise unit personnel on counseling requirements, explain the types of evaluation reports, advise personnel on the Evaluation Report Redress program, compute report periods, and verify required forms

Special Condition: None

Safety Risk: Low

MOPP 4: Never

Task Statements

Cue: You have received an evaluation report that requires review and processing.

DANGER

None

WARNING

None

CAUTION

None

Remarks: None

Notes: None

Performance Steps

1. Advise personnel on the principles of the Evaluation Reporting System (ERS).

a. Three types of evaluations.

(1) Performance evaluations.

(2) School evaluations.

(3) DA evaluations.

b. Primary function of the ERS is to provide information to HQDA for use in making personnel management decisions.

c. Secondary function of the ERS is to encourage leader professional development and enhance mission accomplishment through sound senior and/or subordinate relationships.

2. Verify the appointment of rating chain officials and publication of the rating scheme.

a. Ensure valid rating chains are established by commanders or commandants.

b. Confirm officer rating chains consist of the rated officer, the rater, and the senior rater (an intermediate rater may apply in certain situations).

c. Ensure that NCO rating chains consist of the rated NCO, the rater, the senior rater, and the reviewer.

3. Advise unit personnel on the counseling requirements that support ERS.

a. DA Form 2166-9-1 is used by the rater to counsel the rated NCO.

b. DA Form 2166-9-1 is used to integrate SGT/SGTP participation in the evaluation.

c. DA Form 2166-9-2 is used to integrate SSG-MSG/1SG participation in the evaluation.

d. DA Form 2166-9-3 is used to integrate CSM/SGM participation in the evaluation.

e. DA Form 67-10-series is used to integrate the rated officer participation in the evaluation.

f. DA Form 67-10-1A is used to assist in the professional development of Army officers.

4. Explain the types of evaluation reports to unit personnel.

a. Mandatory.

b. Optional.

5. Advise personnel on the principles of the Evaluation Report Redress Program.

a. Commanders/Commandant's Inquiry.

b. Appeals process.

c. Army Board for Correction of Military Records (ABCMR).

6. Compute report periods.

a. Determine the period covered.

b. Identify codes and reasons for non-rated periods.

c. Compute the number of rated months.

7. Verify required forms that support evaluation reporting.

a. DA Form 67-10-Series (OER).

b. DA Form 67-10-1A (OER Support Form).

c. DA Form 2166-9-1 (NCOER Counseling and Support Form).

d. DA Form 2166-9-1 (SGT).

e. DA Form 2166-9-2 (SSG-MSG/1SG).

f. DA Form 2166-9-3 (CSM/SGM).

g. Advise unit leaders on the preparation and processing guidelines and restrictions for evaluation reporting.

h. Ensure required reports are referred to the rated officer by the senior rater for acknowledgement and comment prior to forwarding to HQDA (e.g., Relief for Cause, negative comments on Army Values, etc).

i. Ensure reports are prepared according to procedures detailed in DA Pam 623-3.

j. Upon completion forward reports to the appropriate agency within the appropriate timeframes.

(Asterisks indicates a leader performance step.)

Evaluation Guidance: None

Evaluation Preparation: None

PERFORMANCE MEASURES	GO	NO-GO	N/A
1. Advised personnel on the principles of the Evaluation Reporting System (ERS).			
2. Verified the appointment of rating chain officials and publication of the rating scheme.			
3. Advised unit personnel on the counseling requirements that support ERS.			
4. Explained the types of evaluation reports to unit personnel.			
5. Advised personnel on the principles of the Evaluation Report Redress Program.			
6. Computed report periods.			
7. Verified required forms that support evaluation reporting.			

Supporting Reference(s):

Step Number	Reference ID	Reference Name	Required	Primary
	AR 623-3	Evaluation Reporting System (http://armypubs.army.mil/epubs/pdf/r623_3.pdf)	Yes	Yes
	DA FORM 2166-9-1	NCO EVALUATION REPORT (SGT)	Yes	No
	DA FORM 2166-9-1A	NCO EVALUATION REPORT SUPPORT FORM	Yes	No
	DA FORM 2166-9-2	NCO EVALUATION REPORT (SSG-1SG/MSG)	Yes	No
	DA FORM 67-10-1	Company Grade Plate (O1 - O3; WO1 - CW2) Officer Evaluation Report	Yes	No
	DA FORM 67-10-1A	Officer Evaluation Report Support Form	Yes	No
	DA Form 67-10-2	Field Grade Plate (O4 - O5; CW3 - CW5) Officer Evaluation Report	Yes	No
	DA Form 67-10-3	Strategic Grade Plate (O6) Officer Evaluation Report	Yes	No
	DA Form 67-10-4	Strategic Grade Plate (O7) Officer Evaluation Report	Yes	No
	PAM 623-3	Evaluation Reporting System (http://armypubs.army.mil/epubs/pdf/p623_3.pdf)	Yes	Yes

Environment: Environmental protection is not just the law but the right thing to do. It is a continual process and starts with deliberate planning. Always be alert to ways to protect our environment during training and missions. In doing so, you will contribute to the sustainment of our training resources while protecting people and the environment from harmful effects. Refer to FM 3-34.5 Environmental Considerations and GTA 05-08-002 ENVIRONMENTAL-RELATED RISK ASSESSMENT.

Safety: In a training environment, leaders must perform a risk assessment in accordance with ATP 5-19, Risk Management. Leaders will complete the current Deliberate Risk Assessment Worksheet in accordance with the TRADOC Safety Officer during the planning and completion of each task and sub-task by assessing mission, enemy, terrain and weather, troops and support available-time available and civil considerations, (METT-TC). Note: During MOPP training, leaders must ensure personnel are monitored for potential heat injury. Local policies and procedures must be followed during times of increased heat category in order to avoid heat related injury. Consider the MOPP work/rest cycles and water replacement guidelines IAW FM 3-11.4, Multiservice Tactics, Techniques, and Procedures for Nuclear, Biological, and Chemical (NBC) Protection, FM 3-11.5, Multiservice Tactics, Techniques, and Procedures for Chemical, Biological, Radiological, and Nuclear Decontamination.

Prerequisite Individual Tasks : None

Supporting Individual Tasks :

Task Number	Title	Proponent	Status
805C-42A-4233	Coordinate Personnel Information Management (PIM)	805C - Adjutant General (Individual)	Approved

Supported Individual Tasks : None

Supported Collective Tasks : None